



Filing ID #10023406

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Jess Phoenix
Status: Congressional Candidate
State/District: CA25

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/16/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Acorns Aggressive Portfolio [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage Roth IRA - USAA [IH]	SP	\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Electro Scientific Industries, Inc. (ESIO) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity Investments 401(k) [MF]	SP	\$50,001 - \$100,000	Dividends, Interest	\$201 - \$1,000	\$5,001 - \$15,000
Ford Motor Company (F) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
HMS Holdings Corp (HMSY) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
J.C. Penney Company, Inc. Holding Company (JCP) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
R.R. Donnelley & Sons Company (RRD) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Vanguard Roth IRA [IH]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Snap Inc. Class A (SNAP) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
USAA Precious Metals & Minerals Fund [MF]		\$1 - \$1,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Viavi Solutions Inc. (VIAY) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Pangolin Pictures	Professional services - Volcanology	\$3,375.00	N/A
COMMENTS: This was a one-time payment for professional consulting services rendered.			
VMWare	Income	\$185,000.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Stonegate Mortgage	2015	Home mortgage	\$500,001 - \$1,000,000
JT	Chase Bank	Ongoing	Credit card	\$10,000 - \$15,000
SP	SoFi	August 2016	Student Loan	\$15,001 - \$50,000
	SoFi	July 2016	Student Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Blueprint Earth

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Roth IRA
DESCRIPTION: Vanguard Roth IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

COMMENTS

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Jess Phoenix , 05/16/2018